
VENDOR APPLICATION/PRE-APPROVAL

This outline is for informational purposes. Actual vendor packet will be done primarily through electronic document collection system. with hard copy applications available upon request.

Steps:

1. Send prospective vendor a welcome and thank you note.
 - a. Thank you for your interest in becoming a vendor for our school. Community vendors play a valued role in providing top notch materials and/or instruction/tutoring that exceeds educational standards, and balances accountability with learning flexibility.
 - b. Before getting into the schools' requirements, we need to define some important terms.
 - c. Intro to Vision and Mission
 - i. Vision
 1. **LEARNING:** The primary goal of Excel Academy is that each student continues to grow in knowledge, ability and social/emotional intelligence. Students are encouraged to work any time, any place, and are supported by teachers, curriculum and staff that will adapt to the uniqueness inherent in every student and learning situation. Excel Academy pursues a learning environment where every student will be challenged by, enjoy, and help direct their own education.
 2. **INDEPENDENCE:** Excel believes one of the key elements of an optimal education is to place the student in a climate where curiosity and exploration are rewarded. While Excel Academy's curriculum aligns itself to California's academic content standards, each family may avail themselves of alternative or supplemental learning resources that can help prepare each student for the real-life complexities of higher education and the ever-changing job market.
 3. **FLEXIBILITY:** Flexible pacing enables each student, under the guidance of the teacher of record, to target individual needs without the demands of a classroom. By developing an awareness of their own unique learning style and advancement in their communication abilities, students and families will be enabled to

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- discover their greatest areas of need and direct their efforts accordingly.
4. **EMPOWERMENT:** Excel Academy strives to empower students to take ownership of their education and develop not only the appropriate knowledge, skills, and abilities, but also the confidence, creativity, and discipline to help them adapt to the challenges and opportunities of the 21st century.
- ii. **Student Vision Statement:** School's students are intrinsically motivated learners who are well equipped for life's challenges and serve their communities, while successfully pursuing their interests with integrity.
 - iii. **Core Values** The following demonstrates the school's core values. School will strive to demonstrate and live these values.
 1. **Sustainable Quality** - Our chartered programs have the flexibility to create customizable learning for any student, no matter their past experience in traditional education, with a strong foundation of award winning educator experience
 2. **Individualized Learning** - Students of all backgrounds find themselves learning like never before as they are supported and guided by our education expertise to find the best program for their needs and goals
 3. **Integrity** - Founded by educators, our programs are held to the highest standards of financial and curriculum excellence so that students thrive
 4. **Innovation for Every Student** - The uniqueness of every student is matched by our diverse array of programs that are always innovating and pushing forward for the betterment of student learning
 5. **Collaborative Partners** - We strengthen relationships between families, programs, authorizers, and the community to create a learning environment that supports everyone
2. An explanation of the application and pre-approval Process. **Timeline** - prospective vendors will have 30 calendar days from the date the initial application was received to complete the onboarding process. If the vendor application process is not completed within this aforementioned time period the application will no longer be considered

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active. The time to complete this application and pre-approval process is approximately one hour.

3. Complete: Vendor Informational Sheet
4. Review and agree: General Terms and Conditions of the Purchase Order
5. Review and agree: This application and pre-approval process is an application to be listed as an approved vendor only. This application and pre-approval in no way is an agreement or contract for the school to purchase goods or services from vendor. An approved vendor in no way is promised to receive purchase orders from the school. The application and pre-approval process is not an offer nor an acceptance of an offer made by a vendor.
6. Review and agree: School retains the right to reject the vendor application at any time and for any reason, including revoking previously approved applications.
7. Review and agree: School does not control whether the vendor retains an employee, the school has no control over the vendor's employment decisions (hiring/firing), but the school reserves the right to retain or reject who works with our students.
8. Review and agree: **NO EMPLOYMENT RELATIONSHIP:** Notwithstanding any language in this application and pre-approval process or the Terms and Condition of the Purchase Order to the contrary, the parties intend that their relationship will be only as set forth in each purchase order. Neither party nor any employee, agent, officer, or independent contractor of or retained by either party shall be considered an agent or employee of the other party for any purpose or entitled to any of the benefits that the other party provides for any of the other party's employees including but not limited to retirement plans such as CalSTRS. Furthermore, each party acknowledges that it shall be responsible for all federal, state and local taxes for it and its employees and reports relative to fees under each purchase order and each party will indemnify and hold the other party harmless from any failure to file necessary reports or pay such taxes.
9. Review and agree: Vendor FAQs.
10. Review and agree: **Standards** - School is a TK-12 public school and strives to meet California Common Core State Standards. Student funds can only be used toward educational activities that align to these standards.
11. Review and agree: **Non-Sectarian Policy** - The vendor agrees that it will not provide services or products that are sectarian, religious, or denominational in content.
12. Review and agree: **Conflict of Interest Policy** - The vendor agrees that instructional funds cannot directly or indirectly be spent on their own family for services they render, as this would be a conflict of interest. "Family" for the purpose of this policy, can be

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defined as: spouses, domestic partners, children (including step-children and foster children), parents, step-parents, grandparents, grandchildren, and siblings (including step-brothers and step-sisters). Vendors have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. Such a conflict occurs when a vendor is in a position to influence a decision to use instructional funds that may result in direct or indirect personal benefit for the vendor or for Family (as defined above) as a result of the school's business dealings. Vendor shall disclose such relationships with Excel Academy Charter School that constitute or may constitute a conflict of interest pursuant to the law, including but not limited to California Education Code Section 56042. Pursuant to California Education Code Section 56042, a parent, someone acting on behalf of a parent, a vendor or a service provider of an individual with exceptional needs shall not recommend placement at vendor's facility if the parent, someone acting on behalf of the parent, the vendor or the service provider is employed or contracted by the vendor, or will receive a benefit from the vendor, or otherwise has a conflict of interest.

13. Review and agree: No use of school's name in full or in part or the school's logo may be used by vendor without the express written consent of the school. School may withhold such consent in school's sole absolute discretion. All requests for use should be made to studentservices@excelacademy.education. [Excel Academy Name and Logo Policy](#).
14. Review and agree, and upload: W9 Collection: Upload documents to our online Tax Identification Number portal.
 - a. All new vendor applicants must upload a W-9 tax form to tax1099 - an online accounting software. Upon digital receipt, W-9 is verified by means of a tax identification number (TIN) validation.
 - b. Returning vendors: Updated W-9 tax forms will be acquired at the beginning of each calendar year in January. W-9 forms will be bulk acquired through the tax1099.com platform.
15. Review, agree, and upload: Certificate of Insurance (COI) Collection: Upload documents to our online risk center.
 - a. New Vendors: The school defines vendors who interact with and/or engage with the school's students whether in person or through virtual means as service vendors. Service vendors must furnish proof of commercial liability insurance in the form of a COI and meet the requirements outlined in our Terms & Conditions of the Purchase Order in order to be approved. Once you have submitted your

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application, school staff will create a profile in our risk management center ([linked here](#))

- b. Returning Vendors: Review and agree to the required coverage requirements. Your profile already exists in our risk management center. School staff will contact you when the coverage listed on your COI is at or near expiration, or if the COI previously provided does not meet the schools requirements.
 - c. Review video: *The Value of Liability Insurance*
16. Review and agree: Vendor Code of Conduct
17. Review and agree to: Collection of Live Scan Live Scan and Fingerprinting Clearance Forms